



**Investor data sharing user manual**  
Manager version

# Introduction

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INREV Investor Data Sharing Tool delivers on our mission to facilitate performance information exchange between investors and managers and to further increase transparency through consistent investor data analytics.

This manual is a step-by-step guide from the **manager** perspective on how to enable vehicle visibility and manage data access requests.



# Sharing manager role

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To set vehicle visibility and manage incoming investor data access requests you must request/be assigned the 'Sharing manager' role.

If you are a new user on the [INREV Data Platform](#), you can select this role when registering your account for the first time.

If you are an existing user on the INREV Data Platform, please reach out to [Connor van Leeuwen](#)

User Manager: manage user roles in this organisation

Asset Manager: contribute and approve all assets data

Asset Contributor: provide data on select assets

Asset Viewer: readonly access to all assets data

ESG Manager: contribute data and access analysis tools

Vehicle Manager: contribute and approve all vehicle data

Vehicle Contributor: provide data on select vehicles.

**Sharing Manager: approve and manage data sharing requests from other organizations**

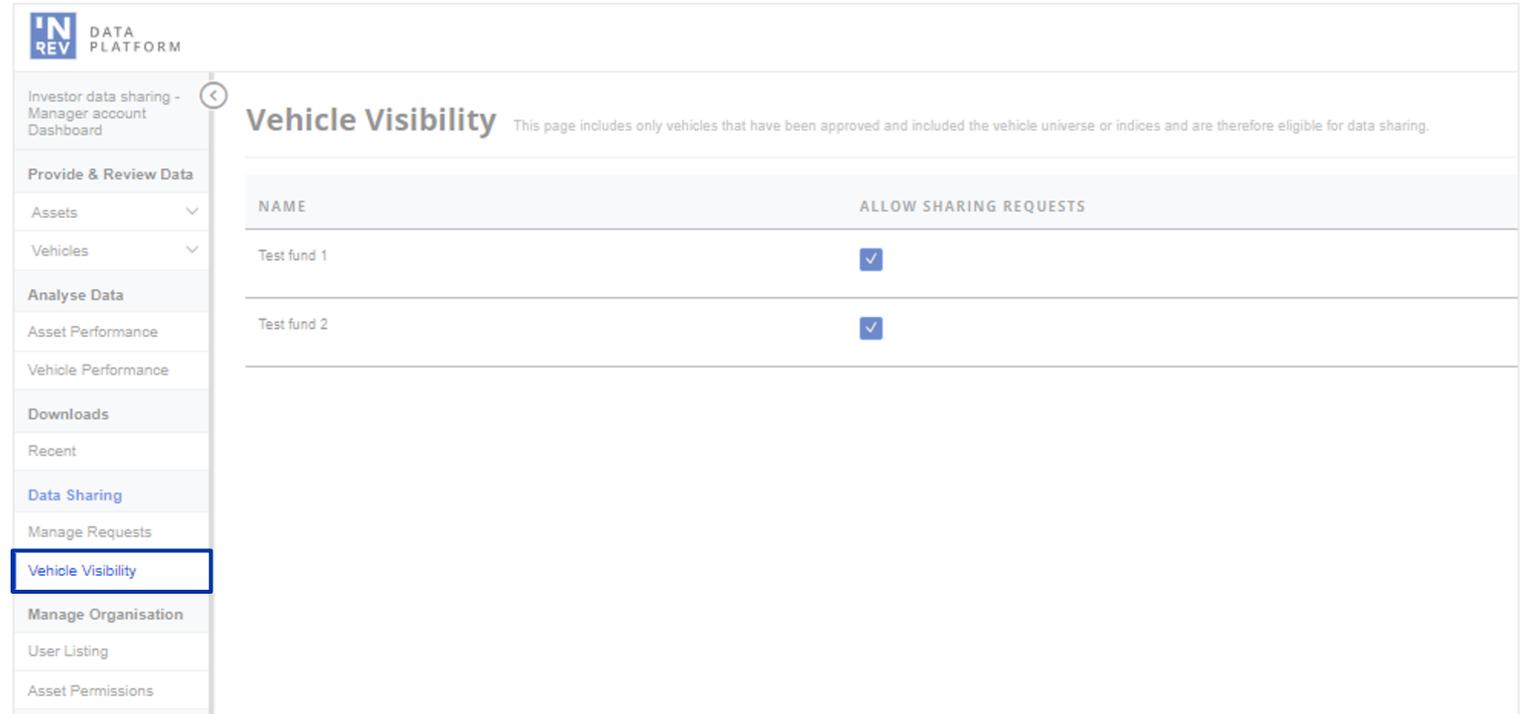
User: view user listing and published indices if available.

Survey User: can view links survey links

# Enable vehicle visibility

Use the navigational menu on the left-hand side to select which of your vehicles will be visible for investors to request access to, simply click on 'Vehicle visibility'.

Only those vehicles that are approved by INREV and are included in the universe or an index will be eligible for data sharing.



**IN REV DATA PLATFORM**

Investor data sharing - Manager account Dashboard

**Provide & Review Data**

- Assets
- Vehicles

**Analyse Data**

- Asset Performance
- Vehicle Performance

**Downloads**

- Recent

**Data Sharing**

- Manage Requests
- Vehicle Visibility**
- Manage Organisation
- User Listing
- Asset Permissions

## Vehicle Visibility

This page includes only vehicles that have been approved and included the vehicle universe or indices and are therefore eligible for data sharing.

NAME	ALLOW SHARING REQUESTS
Test fund 1	<input checked="" type="checkbox"/>
Test fund 2	<input checked="" type="checkbox"/>

# Tailor investor data access

Any incoming investor data access requests can be accepted, tailored or declined.

You remain in control over which investor has access to what data, for how long, or if at all.

Data access can be tailored per vehicle by level of access, performance history and access duration.

**IN REV DATA PLATFORM**

Investor data sharing - Manager account / Data Requests / Manage Data Request

### Manage Data Request

Review and Respond to Pending Request

REQUEST DATE 14 December 2023 (3 months ago)	REQUEST STATUS Pending
REQUESTED BY Connor van Leeuwen Investor data sharing - Investor account connor.vanleeuwen@inrev.org	REQUEST DETAILS Vehicles requested: Test fund 1 and Test fund 2 REQUEST DETAILS NA

**Select a Response**

[Accept and Adjust Request for Access](#) [Reject Request with Note](#) [Clear Your Response](#)

**Confirm Vehicles to Share**

VEHICLE	PERFORMANCE HISTORY	ACCESS DURATION
<input checked="" type="checkbox"/> Test fund 1 <span>Requested</span> <input checked="" type="checkbox"/> Include vehicle performance	<input checked="" type="radio"/> All history <input type="radio"/> Specific time ranges	<a href="#">Indefinitely</a> <a href="#">Until</a> Expiration Date
<input checked="" type="checkbox"/> Test fund 2 <span>Requested</span> <input checked="" type="checkbox"/> Include vehicle performance	<input checked="" type="radio"/> All history <input type="radio"/> Specific time ranges	<a href="#">Indefinitely</a> <a href="#">Until</a> Expiration Date



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